Lotus Domino® Application

GEOCOM® CUSTOMER & CONTACTS

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User Manual

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1 Introduction

The database GeoCom® Customer & Contacts is an information system designed to support your company's administration process of customer data along with all its contacts and related projects.

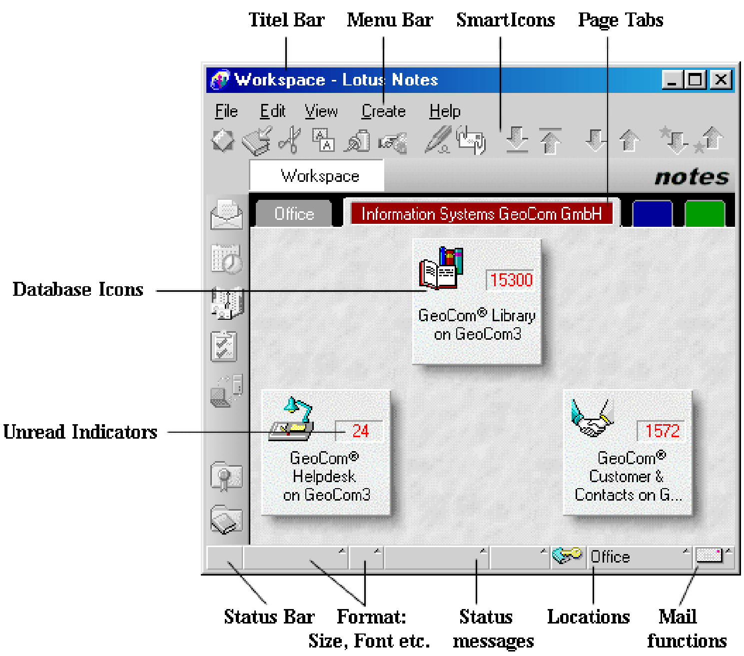

Illustration: The Lotus Notes Desktop with its functional elements

All crucial activities are supported by the application, such as the process of acquisition of new customers, the cultivation of the new relationship as well as the supervision of transactions.

GeoCom® Customer & Contacts is principally based on customers' profiles and contact profiles which, when required, can be extended by project profiles. Activities like telephone calls and correspondence can be assigned to this framework.

The complete record of all customer and contact profiles is maintained in visual representation providing an easy and comprehensive overview of all activities of your customer relationship like phone calls, meetings, correspondence, and offers. The complete history of your relationship with a customer is available at any time including related documents. An integrated system for re-submission helps you to organise your work even better.

The database GeoCom® Customer & Contacts can be used for creating offers as well as for pre-sales activities.

Using this database not necessarily means to be online permanently. All activities can be done at every location, like home office or remote during a business trip.

2 Database GeoCom® Customers & Contacts

This manual explains the structure of the database and details on the operational sequence of this administration system.

The database provides a multilingual user interface (views and dialog boxes).

The core element consists of an open information pool, including all documents ever exchanged with a single customer, like contact name, projects, offers, and other specific transactions.

The database GeoCom® Customer & Contacts contains the full record of all customer data with its related documents, such as offers, transactions, meetings, phone calls and correspondence.

Illustration: Open database GeoCom® Customer & Contacts

2.1 Adding the database to the workspace

To add the icon of the database to your Notes workspace simply select

File -- Database -- Open

Illustration: Dialog box to open the database

First, select the server on which the database resides. Using the scroll bar, choose a database from the list displayed in the window and select it with a mouseclick. Finally click on the button “Add icon”.

You will now find the database on your Lotus Notes desktop.

2.2 Opening the database GeoCom® Customer & Contacts

Now that you have added the database onto your workspace open it by

double clicking the new symbol on your desktop.

The following Graphical Navigator (Main Menu) is now displayed:

Illustration: "Main Menu"

Note: The "**Esc**"-key can always be used to close a window.

The Action-Bar is located between the view and the SmartIcon-Bar. Depending on the view currently selected, specific actions become available.

Typically, the Standard Navigator is not visible. However, it can be opened by moving the left margin with your mouse. It provides a detailed overview of all views available.

Illustration: "Standard Navigator"

Views in the navigator preceded by this green symbol (also called twistie) will yield more options when you click the symbol with your mouse.

Note: The section "General Options" within the personal configuration document is used to fix if the Standard navigator should be visualised or not. See also chapter 6.1 "General Options".

2.3 Opening views

Views provide a quick overview of available documents. Each line within a view represents a document, giving you a one-line summary of the essential information characterizing that document.

GeoCom® Customers & Contacts provides you with a detailed summary of the master data, comprising contact and project profiles of your customers.

This type of contact management makes it easy for you to select your information by a category such as company name or contact name.

If, let’s say while on the phone, you need a particular piece of information on your customer, that's easy: an overview of a customer's complete history is just a few mouse clicks away, such as the caller's name or the enterprise he is working for.

There are different methods to obtain a view: Use any of

- the Graphical Navigator
- the Standard Navigator
- the Action-Bar by hitting buttons
- the column titles

2.3.1 Activities

View "1. Activity by ... ” lets you select documents by the following categories:

- company name
- responsible persons
- status
- type
- region

Illustration: View "1. Activity by ... a. company name"

Information selected in a specific view is displayed in the main window - the View Pane - in alphabetical order. Use the scroll bar to the right of the window to browse through your stock of documents. The selected view can also be displayed enlarged or condensed.

Note: Entries can be enlarged using the button . Instead, to condense the view click on the button . These icons are at your disposal within the SmartIcon-Bar.

2.3.2 Re-submission

View "2. Re-submission... ...” lets you select documents by the following categories:

- due date
- task
- calendar
- context

The actual view, selected within the Standard Navigator will be displayed in the main window.

The view (main window) can be condensed or enlarged with the corresponding button.

2.3.3 Contacts

View "3. Contacts by... ...” lets you select documents by the following categories:

- company name
- contact name
- phone
- zip code
- contact name ABC
- contact status
- customer status
- customer type
- region

The following screenshot shows the view "3. Contacts by a. company name". Beside the company’s name the corresponding customer profile and contact person(s) will be displayed.

Illustration: View "3. Contacts by... a. company name"

2.3.4 Contacts for export

The complete stock of contact data (contact persons) is displayed in the view "4. Contacts for export".

Data stored in the folder comprises the following items:

- address
- given name
- surname
- company name
- street
- zip code
- city
- phone number

All parameters are separated by a semicolon.

The following screenshot shows the folder "4. Contacts for export" containing a systematic listing of data.

Illustration: View "4. Contacts for export"

All or part of the information in this folder can be exported to text processing systems like MS-Word, MS-Excel etc.

Mark records you wish to export in the selection column. In order to mark entries, click on each item or to select all, use the pressed left mouse-button and check-mark all contacts within the selection column

Then, select from the menu bar:

File -- Export

Next, specify a file name, select the file type, such as "MS-Excel", "Structured Text" or "Lotus 1-2-3 Worksheet" and save the file.

2.3.5 Offers

Only for authorised users view "5. Offers ... “ is visible in the Standard Navigator.

As an authorised user you can select documents by the following categories. This view has restrictions for users and can only be visualised with access permission.

Offers by:

- customer name
- month
- year

The following screenshot shows the view "5. Offers by customer name". Within the main window all offers will be displayed, including the date and amount as well as the expected amount.

Illustration: View "5. Offers by customer name"

2.3.6 Transactions

Depending on the assignment of access roles view "6. Transactions...“ becomes visible in the Standard Navigator.

As an authorised user you can select documents by the following categories. All previous transactions will be displayed within the main window. This view has restrictions for users and can only be visualised with access permission.

Transactions by:

- month
- year
- payment received date

The following screenshot shows the view "6. Transactions by month". IN the main window all transactions are listed, including date and amount.

Illustration: "6 Transactions by month"

2.3.7 Miscellaneous

Within view "7. Miscellaneous ... " you can select documents different categories. This view has no restrictions, and can be used by every user.

The view provides an overview of all templates stored in the database. The main window displays the complete stock of all templates, including the author's name.

- a. templates
- b. documents by modification date

This view was previously a personal view (private on first use). That means only documents edited by yourself were visible.

Now all documents are listed in this view.

To remove the "old" personal view you can use the following procedure:

\- open the "private" view

\- choose from the menu:

Actions -- View Options -- Delete View

The following screenshot shows the view "7. Miscellaneous b. docs by modification date".

Illustration: View "7. Miscellaneous: a. docs by modification date”.

Beside the views that you can reach using the Standard Navigator you can also use the so called Graphical Navigator, providing additional views.

Using the Graphical Navigator it is also possible to select the following options:

- Letter templates
- Documents by date
- Mass mailing

2.4 Switching between views

Documents inside the application GeoCom® Customers & Contacts can be retrieved from a variety of views, without necessarily using the Standard Navigator.

For this the database provides different buttons situated within the Icon Bar.

2.4.1 Calling up documents in another view

Suppose you have selected a document by phone number in the view "3. Contacts by c. Phone“ and you would like to switch to the view of a complete history of the activities.

This is how you switch to the new view: Put a check-mark in the Selection Column next to the document;

Clicking the button with the Ctrl-key pressed will take you automatically to the new view "A. activity ... by company name“. The selection will also be maintained within the new view.

2.4.2 Switching views within the same category

Suppose you have selected a document in the view "A. activities by a. company name“ and you would like to switch to the view "A. activity ... e. by region“ without going through the menu.

Put a check-mark in the Selection Column next to the document which you want to see in another view.

With the Ctrl-key pressed click the button

2.5 Closing views

Switching to a new view automatically closes a previously opened view.

However, a view can be closed by selecting from the menu bar:

Menu -- File -- Close

or by pressing the **Esc**-key.

2.6 Standard activities

During daily the work with the database several activities can be executed over the Menu bar. Those activities - standard activities - are described in the following paragraphs.

2.6.1 Searching and viewing documents

In general, you can search for documents and display entries in different views.

Make sure you are clear what item you want to search for before you start searching entries. The Graphical Navigator provides different views by which you can search for entries.

In order to search for a customer profile first open the view "1. Activity by ... a. company name“ within the Graphical Navigator.

However, if you would like to look for a specific phone number (because you do not know the corresponding contact name) select the view "3. Contacts by ... e. phone number“ within the Graphical Navigator.

Example:

Suppose you would like to look for a company whose name you barely remember. In the Graphical Navigator open the view "1. Activity by ... a. company name“ as described before.

Choose between two search methods: a search box for quick search (this search is always looking for your search request in the currently sorted column from left) and a search box for an advanced search, which is working within the visible text in a view.

Start the search by typing the first letters of the company's name.

A search box for quick search automatically opens.

Illustration: Search box “Quick Search”

Confirm with OK. If found, the customer profile is marked. Double click to open the selected document.

In addition, you can start an advanced search. Click on the flashlight icon . A search box for an advanced search appears opens.

Illustration: Search box “Advanced Search”

Enter the name you are looking for and confirm with Find Next

Example:

Suppose you know the contact name, however the company name is unknown, select within the Graphical Navigator the view "3. Contacts by ... b. contact name".

A view with a listing of all contact names in alphabetical order is presented. Enter the first letters of the contact profile you search. A dialog box for quick search opens automatically. Start search with OK. The corresponding document is now displayed. Next to the respective contact name company name, telephone number, street, ZIP code and city are listed.

With the Ctrl-button pressed click the button, which will take you into the view "1. Activity by ... a. company name“.

Note: Apart from searching for customers and contact profiles you also can look for more specific categories like customer status, customer type, region, phone number or ZIP code.

2.6.2 Documents in preview

To see a document in the preview select a view, e.g. "1. Activity by ... a. company name”.

Now click on an entry you want to see in preview.

Click on the button in the SmartIcon-Bar.

2.6.3 Editing documents

Before editing documents it is necessary to select a view. Suppose you have selected the view "1. Activity by ... a. company name".

Now, to edit documents, first select a document and open it by a double click.

Then you either can click on the button or on the button in the SmartIcon-Bar.

2.6.4 Deleting documents

Before deleting documents it is necessary to select a view. Suppose you have selected the view "1. Activity by ... a. company name".

To delete documents first select a document. Mark the corresponding document by putting a check-mark next to it.

Then press the **DEL** key. Within the view appears a "wastepaper basket" icon next to the entry.

Now press the **F9**-key to open this dialog box:

Confirm with YES (Ja). In order to cancel the activity press NO (Nein).

You change back to the selected view. However, the document you wanted to delete is still marked with the “wastepaper basket” icon.

Select from the Menu bar:

Edit -- Undo delete

The icon will disappear.

Note: To edit and delete documents you must have access to the database as an editor.

2.6.5 Printing documents

Before printing documents it is necessary to select a view. Suppose you have selected the view "1. Activity by ... a. company name".

While an open document can easily be printed by clicking the button you can also print views or selected documents.

In order to print, e.g. a contact profile first select the entry within the view and check-mark it with your mouse (in order to print several entries from a view, such as call-documents and letter documents, put a check-mark next to each document you would like to print).

Then select from the Menu bar:

File -- Print

A dialog box for setting printing options opens.

Illustration: Dialog box “file print”

View options: In the view options you can decide if you want to print the currently selected view or individual documents.

Printing views works just the same way. In order to print a complete view, first select the view you would like to print; use the standard print procedure and select the option "Print view“. Confirm with OK.

3 Recording documents for master data and activities

Master data and activities related to a customer are recorded in electronic forms and yield a view of the chronological development of your relationship with a customer.

For the master data and the most important activities such as

- customer profile
- contact profile
- incoming and outgoing telephone calls,
- incoming and outgoing correspondence
- meetings as well as
- sales

the application provides you with special recording forms.

For additional information, files such as documents generated in common word processors, spread sheets, bitmaps or OLE-objects can be attached.

As views provide specialised perspectives on subsets of the complete pool of data, individual buttons for the various activities are available in the Action-Bar.

Beside these button the database provides another button in order to open a Dialog box containing a list for other activities. The list displayed within the dialog box depends on an actual selected view, it means, corresponding to a selected view, the list displays other items that are at your disposal. To select an option click on it by one mouse click.

3.1 Recording customer and contact profiles

Usually recording new customer data starts with the creation of a customer profile to which one or more contact profiles (employees‘ names) are assigned.

This master data is used as the basic data to which information on subsequent activities is assigned.

3.1.1 Recording customer profile

To record information on a company, first select the view “1. Activity ... by a. company name”. Click on any customer profile. Take only care of that the main category (customer) is highlighted and not a single contact profile, in order not to overwrite data. When you have selected

a customer profile, click next on the button.

The following screenshot shows an electronic form sheet for recording a new customer profile:

Illustration: Electronic form sheet "New customer profile".

The fields "Company name", "Branch", "Street", "ZIP&City", "Phone", "Fax", "Homepage" and "E-mail" should contain the basic data of the company.

Beside this, It is possible to enter not only the Homepage of a company but also its global E-mail address, e.g. info@geocom.de.

This is especially useful for sending E-mails using the customer profile instead of a contact profile.

Clicking on the symbol next to the field “Homepage” will automatically open the homepage (URL) of the customer (if available).

The field "Description" receives additional information you may want to enter about the customer.

Clicking on the button opens dialog boxes for the selection of several keywords referring to the "Country", "Responsible", "Contact by", "Customer type", and "Region" categories.

Example: Dialog box with keywords for the selection of "Region":

Illustration: Dialog box "Select Region"

By clicking on the entry and then on the button "OK" you select the appropriate keyword. This keyword is then displayed in the associated text field.

The first digits of a phone number are also inserted into the fax number. Therefore, click into the field “fax” after entering a phone number. This is for easy entry of a fax number.

If the fax number is completely different from the phone number you should replace the adopted entry with the proper fax number.

Save the customer profile by clicking on the button.

Note: The electronic form sheet to record a new customer profile only has two compulsory fields, that has to be filled before storing a new document. These two field are:

- company name
- customer status

To close the “New customer profile” document click on the button

.

When a new customer profile is saved a new button to record data about the contact person appears in the Action-Bar.

This button takes you to a new window in which you can generate a new contact profile.

3.1.1.1 Add new branch

You can add new branches of a company to an existing cutomer profile. Therefore select an existing cutomer profile and click the button

.

You will get the standard form of a customer profile with the existing data of the cutomer already filled in. Update the relevant data (e.g. address, telephone number) according to the new branch.

Click the button to create the new branch.

Illustration: Company with two branches

3.1.1.2 Add new project

You can add different projects to an existing customer profile.

To add a project, select an existing profile and click the button

.

You will get a form with all the customer data filled in already. Enter the project name into the field “Project”.

Illustration: Customer profile as project profile

After you have made your changes, click the button to create the new project.

Illustration: Customer with two branches and one project

3.1.2 New contact profile

A contact profile can be assigned to a new customer profile.

Click on the button in order to create a new contact profile.

The following screenshot shows an electronic form sheet to record and to administrate of specific data that refer to a new contact profile, it means to a new contact person.

Illustration: Electronic form sheet "New contact profile".

Some information will be adopted automatically from the customer profile and must not be filled in again.

The address, as well as other data provided through the button can be selected within the following box:

Illustration: Dialog box "Select Salutation".

Select the proper country from the keyword list. The selected text will be copied into the “country” field:

Illustration: Dialog box "Select Country".

Note: Using the option "Customer Profile" within the personal configuration document you can fix the pre-select a country that, every time you open an new electronic form sheet, will be displayed. In addition it is possible to define, if a country should **not** be adopted to the administration of addresses.

At the bottom of the “ New contact profile” window you can see two check boxes:

Select "Yes" to allow the update of entries from the customer profile, e.g. company name, address, phone and fax number, homepage URL, contact status, responsible employee, customer type and customer status.

By selecting "No" you cancel this function and the application will not allow the update of entries.

The information of the customer profile will be adopted by the contact profile. You only have to fill in the name, the e-mail address and the job title of the contact person.

In order to save a document at least the field “surname” has to be filled in; click on the button to save the document. The contact profile is stored in the database.

The update from a customer profile is especially useful when a new contact profile in the future should be recorded. The data will be adopted from the corresponding customer profile. Information will not be lost and have not to be fill in twice.

Using the option "Contact Profile" within the personal configuration document makes sure that correct address- and letter salutation will be generated. This avoid that a false letter salutation will be administrated.

In addition it is possible to fix an individual letter salutation, like Mr. Mrs. etc.

These settings serve on the one hand not to type every time for new the correct letter salutation. On the other hand this avoids errors between the postal address and the correct letter salutation.

The fields letter salutation as well as postal address will be automatically generated while saving a new document. These fields cannot be edited.

Note: The electronic form sheet "New contact profile" has only one compulsory field the has to be filled, in order to store it.

3.1.3 New private customer profile

To record a contact profile not belonging to a company (e.g. private person / customers) click the button "New private customer profile".

The following dialog box comes up:

Illustration: "New document"

Select the keyword "Private customer" and confirm with OK.

The following form comes up:

Illustration: "New private customer profile"

This form can be filled in just as described in paragraph 3.1.1 "New customer profile".

The section address of the person recorded (the address section consists of the letter salutation and the postal address) is generated as the document is saved.

Click the button to save the new private customer profile

3.2 Phone call management

GeoCom® Customers & Contacts supports an extended phone call management. The user can track incoming and outgoing phone calls as well as use the computer integrated telephony TAPI). The TAPI interface is explained in more detail below.

See also chapter "3.4.3 Computer assisted Telephony" as well as "8.7 Phone support".

3.2.1 Incoming phone calls

All information concerning incoming phone calls can be entered into the database corresponding to customers and contact persons.

This makes it possible to see at one glance what was the subject of a call and who had called.

Incoming phone calls can be assigned to each customer profile.

In order to open a "call-document" first search for the customer profile. To do so, select the view "1. Activity by... a. company name" and click on the corresponding contact profile of the person you have been called by, so that the entry is highlighted. Then click the button. The document for recording the incoming call opens:

Illustration: "Calls"

To enter information into the document you have the following options:

- the name of the employee (who was called)
- the date of the call
- the subject ("what was the topic of the conversation?")
- the name of the customer (caller)
- the name of the company the caller represents
- the phone number

Add additional information into the field "Description".

Note: By clicking on the symbol in the form you can switch between different options related to the call. These options include:

- was called by
- is waiting for call from
- will call
- called

The suitable option for incoming calls is "was called by" or "is waiting for call from".

In order to save the data, click on the button.

The call document is marked by the symbol within the list of activities.

3.2.2 Outgoing phone calls

In order to open a "call-document" to enter information regarding the subject you just discussed with a customer, first search for the customer profile.

Then click on the corresponding contact profile of the person you have called.

Now click on the button. The following document opens.

Illustration: Administration "New call"

Note: The dialog box "Call to ..." for automatic dialling appears if configured in your personal configuration (see also chapter "8. Personal Configuration").

Inside the document the following options are available:

- the name of the employee (who made the call)
- the date the call was made
- the topic of the conversation
- the name of the customer called
- the name of the company the customer represents
- the phone number called

By clicking on the symbol you can select between different options related to the call:

- was called by
- is waiting for call from
- will call
- called

The suitable options for an outgoing call is "called" or "will call".

In order to save the data, click on the button.

The call document is marked by the symbol within the list of activities.

3.2.3 Computer assisted telephony

GeoCom ® Customer & Contacts supports computer assisted telephony via TAPI (Telephony Application Programming Interface). This means that you can generate telephone calls to customers or to in-house-employees with just one mouseclick.

To ensure an automatic dialling check whether or not TAPI is activated. This is done in the personal configuration document.

If TAPI is activated you can automatically dial internal and external phone numbers from the view.

At first open a view, e.g. "1. Activity by ... a. company name“. As described above, search the corresponding customer profile. Check-mark the corresponding contact (it appears highlighted when check-marked).

Now, click on the button. The dialog box for the electronic dialling procedure opens.

Illustration: "TAPI"

The phone number of the currently marked contact profile is displayed in the edit field. However, other phone entries can be selected from a list (e.g. if the partner has several phone numbers).

Confirming the selection with OK. Starts the dialling procedure.

To store personal settings like TAPI support within the personal configuration document refer to (see also chapter "8.7 Phone support").

Beside recording calls etc., minutes of conferences can be saved with the customer's history.

All information related to the meeting’s topic, such as MS Word documents, spread sheets etc, can be assigned to this document.

The names of the participants of a meeting can be adopted from the

Note's address book.

Prior to associating a meeting document with a customer you need to select the customer from any activity view (e.g. "1. Activity by ... a. company name").

To add a new meeting-document click on the button in the Action-Bar.

3.3 Meeting

The following meeting-document opens:

Illustration: "Meeting"

These input fields are available :

- date of the meeting
- name of the company the customer represents
- attendees (the persons who took part in the meeting)
- theme (the topic of the meeting)
- minutes (all additional and detailed information)

In order to save the document click on the button.

The meeting document is indicated by the symbol within the list of activities.

3.4 Management of incoming correspondence

With GeoCom® Customers & Contacts you can manage every kind of correspondence such as e-mails, letters, or facsimiles corresponding to each customer or private person.

3.4.1 Incoming corresponding: E-Mail

To manage an incoming e-mail message first search the customer profile and the corresponding contact profile (name of the person) and click on it so that the entry is highlighted. For instance select the view "1. Activity by ... a. company name".

3.4.1.1 Manually add incoming e-mails

In order to open the document for the management of "incoming e-mails" click on the button .

A dialog box opens presenting different options in order to manage the process of incoming correspondence.

The following dialog box opens:

Illustration: Dialog box "Create incoming correspondence"

Select a keyword from the list:

- Incoming correspondence
- E-mail

For the registration of an incoming e-mail message select the option "E-mail". Then click on the OK-button. The following document opens:

Illustration: "Incoming e-mail".

Enter information into the following fields:

- Message from (E-Mail address of the person who has sent the e-mail)
- Received at (date of the incoming e-mail)
- Company name (company name of the sender)
- subject (topic of the e-mail message)

- Recipients (E-Mail address of the persons to that an e-mail was sent)
- CC (E-Mail address of persons who got a copy)
- Blindcopy (E-Mail address of persons who got a blind copy)
- Content of the message

Into the “content” field fill in the text (message) or additional information of the incoming e-mail.

Click on the button to save the data.

The document concerning the incoming e-mail is indicated by the symbol within the view "1. Activities by ...".

3.4.1.2 Automatic adoption of e-mails from mail database

The automatic management of incoming e-mail is similar to the manually management of incoming e-mails.

First, select the corresponding contact profile so that it is highlighted, e.g. view "1. Activity by ... a. company name". Then click then on the

button .

The following dialog box opens:

Illustration: Dialog box "Create incoming correspondence"

Select a keyword from the list :

- Incoming correspondence
- E-mail

In order to manage automatically an e-mail first select the option “E-

Mail“ and confirm with OK. The document for the management of incoming correspondence will be opened.

To adopt the original text from the E-Mail to the new document first change to field “content“. Then click on button

within the symbol bar.

Subsequently a dialog box opens displaying e-mails. Now, select one mail from the list.

Illustration: Dialog box “Import from mail database“

Select the corresponding name with a mouseclick, so that it is highlighted and confirm your selection with OK. All original e-mail information, e.g. sender, content etc” will be transferred into the new document.

Finally, add this document to the history by clicking on the button

.

Incoming corresponding are symbolised within the view "1. Activity by ... " by the following icon .

3.4.2 Incoming letter

For the management of an incoming letter follows in general the same way as the management of incoming e-mails.

First search the customer profile. For instance select the view "1. Activity by ... a. company name". Then click on the corresponding contact profile (name of the person) so that it is highlighted.

In order to open the document for the management of "incoming letter"

click on the button. The following dialog box opens:

Illustration: Dialog box "Create incoming correspondence"

Select a keyword from the list:

- Incoming correspondence
- E-mail

For the management of an incoming letter select the option "incoming correspondence". Then click on the OK-button.

The following document appears.

Illustration: "Incoming correspondence".

Enter information on the following options:

- sender (the name of the contact person or company)
- company name
- date (the date on which the letter was received)
- type of correspondence (four options are available: letter, e-mail, facsimile and other). You can select the suitable type by clicking the respective check boxes. For incoming letters choose the option "letter"
- subject (the main topic of the letter)
- content (the content of the letter with additional information);

Click on the button to save the data.

The document concerning the incoming letter is indicated by the symbol within the list of activities.

3.4.3 Incoming facsimile

The management of an incoming facsimile follows in general the same way as the management of incoming letter.

For the management of an incoming facsimile first search the customer profile and then the corresponding contact profile (name of the person). For instance select the view "1. Activity by ... a. company name".

In order to open the document for the management of "incoming

facsimile " click on the button. The following dialog box opens:

Illustration: Dialog box "Create incoming correspondence"

Select a keyword from the list:

- Incoming correspondence
- E-mail

For the registration of an incoming facsimile select the option "incoming correspondence". Then click on the OK-button. The following document opens:

Illustration: "Incoming correspondence".

Enter information on the following options:

- sender (the name of the contact person or company sending the facsimile)
- company name
- date (the date when the facsimile was received);
- type of correspondence (four options are available: letter, e-mail, facsimile and other). You can select the suitable one by clicking on the check boxes. For incoming facsimiles choose the option "fax".
- subject (the main topic of the facsimile)
- content (the content of the facsimile with your own additional and detailed information

Click on the button to save the data.

The document concerning the incoming facsimile is indicated by the symbol within the list of activities.

3.5 Management of outgoing correspondence

You can manage four different document types as outgoing correspondence. These are presented in the following:

- Outgoing correspondence: Standard
- Letter A4
- WinWord Document
- Notes e-mail

3.5.1 Outgoing correspondence: Standard

This form serves to save correspondence which has already been sent another way before, so typically this describes letters sent in the past which have now been scanned or documents from word processing programs.

To manage outgoing correspondence first select a view, such as "1. Activity by ... a. company name" and select the contact profile of the person to whom you would like to assign the correspondence.

Then, click on the button.

The following dialog box opens:

Illustration: Dialog box “Create outgoing correspondence”.

Select the option “outgoing correspondence” and confirm your choice by clicking the OK-button.

The checkbox “Use template” is activated by default. If you do not wish to use a template for this correspondence simply uncheck the box by clicking it.

The following dialog appears:

Illustration: “Outgoing correspondence”.

Information can be filled into the following different fields:

- Recipient (the name of the contact person)
- Company name (the name of the company the person represents)
- Category
- Date (the date the fax message will be sent)
- Fax (the destination fax-number)
- Postal address (the postal address of the contact person)
- Subject (the main topic of the outgoing fax message)
- Content (the text of the fax with your additional information)

The fields “recipient”, “company name”, “date”, “fax”, and “postal address” are automatically adopted from the contact profile. You can, of course, change the entries manually.

In order to save the document press the button.

3.5.2 Outgoing correspondence: Letter A4

This type of correspondence enables you to create buisiness letters including graphic elements in the letterhead.

You can create a new letter for each new buisiness activity or you can work with personal letter templates.

Templates are useful for every kind of correspondence with standardized texts, e.g. for sending out information material or for the answering of frequently asked questions.

Moreover, letter templates are especially useful for every kind of mailing activities like mass mailings.

Letters of the type letter A4 use the Notes-inherent text processing system for correspondence.

First you have to create a template containing abstract information such as letterhead, address information etc., which essentially remain the same. When using templates to create letters, actual data like postal address, letter salutation and current date will automatically be filled in.

3.5.2.1 Step 1: Creating a new template of type Letter A4

First, within the standard navigator, switch to the view "7. Miscellaneous a. Templates". Within the right window the templates already existing will be displayed.

Click on the button , in order to create a new letter template.

Select the option "Letter A4" within the dialog box. The following view opens:

Illustration: "Specification of letter template"

First, fill in the short description of the template and determine, who should use this template. The person's name, from whose logged in, will be indicated, e.g. **"Greg Davis/ISG"**. It is also possible to replace it and fill in other persons.

Then, begin to format the letter template and fill text to the corresponding fields.

Finally, save the document by clicking on the button .

3.5.2.2 Step 2: Creating Letter A4 using letter templates

In order to create a letter based on a letter template, first select the corresponding contact profile, so it's highlighted within the view.

Then click the button.

A dialog box opens, displaying the different forms for correspondence activities. Select form the list the option "Letter A4". The checkbox for using templates is automatically activated, since GeoCom® Customer & Contacts always uses templates to create letters. Confirm your selection with OK.

Illustration: Outgoing correspondence

A dialog box with already existing templates is opened

Illustration: Letter template

Select the corresponding letter template and confirm with OK in order to open the template.

The following screenshot displays a letter template with already adopted address-information.

Illustration: Letter A4

The customer's postal address as well as the letter date will automatically be generated and inserted into the corresponding field within the document.

The field "subject" remains empty in order to fill in a subject for the letter, e.g. "your letter from" / "your request for" etc.

The letter saltutation is automatically generated according to the settings within the contact profile.

The letter text can now be modified (Layout,content etc.)

Note: To modify the format select from menu:

Text -- Text Properties

The following dialog box appears:

Illustration: Dialog box "Text"

When all modifications are done, you can save the document by

clicking on the button .

To print the letter, click on the button .

3.5.3 Outgoing correspondence: Letters using MS-Word

In the following, creating a letter using a Notes-template with an embedded MS-Word-Document will be explained. This template-type can be used for outgoing correspondence and mass mailings as well as for address slips.

Use this type of letter template for outgoing correspondence and mass mailings disposing of place holders with current field values, such as postal address and letter salutation.

3.5.3.1 Step 1: Creating a Notes document for an MS-Word template

First, within the standard navigator, switch to the view "7. Miscellaneous a. Templates". Within the right window the templates already existing will be displayed.

Click on the button , in order to create a new letter template.

Then, select from the dialog box "Create outgoing correspondence" the option "WinWord document“ and confirm with OK.

Illustration: Dialog box “Create outgoing correspondence”

You will get an empty Notes document for an embedded WinWord template.

Illustration: Letter template WinWord document

First, fill into this new document a short description (here: e.g. Letter template), and select a category (e.g. GeoCom Customer & Contacts). Finally lay down a subject, e.g. Clifford and Partner LTD.

3.5.3.2 Step 2: Embedding an MS-Word document as template

Now you can create a new MS-Word document or you can use an already existing document from your local machine. The second possibility is more recommendable since it is explained in the following.

Click into the field below and select from menu:

Create -- Object

The following dialog box opens:

Illustration: Dialog box create object

Select from the category "Create new" the option "object from file", thus you are referring to an existing Word document.

Checkmark then "Show as symbol"

Finally open the archive, that contains the template, e.g. archive "Letter templates".

Illustration: Dialog box Create object from file

Select the corresponding letter template from the main window and click on it, so that it is highlighted. Checkmark then the option "preview" in order to see the template in preview. Finally confirm your selection with "open". You'll automatically switch back to the previously opened dialog box, that now displays the relevant data.

Illustration: Dialog box Create object

Check the data and embed the MS-Word-template as object to the opened Notes document by clicking the button .

3.5.3.3 Step 3: Prepare an embedded Word document for the adoption of Notes data

Adoption of data from Notes documents into MS-Word documents is done by bookmarks. By default bookmarks are searched within the MS-Word document, which match fieldnames from Notes. Once such a bookmark is found its content will be replaced by the field value from the selected Notes document. Because names of bookmarks may only be used once in MS-Word, each field value can only be adopted once this way. A workaround for this drawback is to alternatively use the content of the bookmark for the synchronization with Notes. Thus, any name can be given to the bookmark. The desired fieldname now has to be placed into the bookmark content in angle brackets.

In the following the standard procedure will be explained.

To modify the file "Letter.doc", highlight the field with the WinWord logo with one mouse click and select from menu:

Document – Open

The letter template (the MS-Word-document) will automatically be opened within the word processing system MS-Word.

Illustration: Microsoft Word document in template WinWord document

Now, it is possible to modify both, the text and format standards of the letter template.

In order to adopt field contents from a selected contact profile into the MS-Word document, the corresponding fieldnames first must be inserted into the MS-Word template as bookmarks.

To insert bookmarks into a Word document enter a placeholder text which will later be replaced by an address or letter salutation.

Example:

Insert a text field into the template, where the postal address should be displayed later on. Subsequently fill in e.g. "Address". Highlight the complete text as the illustration showed below.

It is necessary to highlight the complete text field, because only this part will be replaced by specific address information like company name, street, zip code, city etc.).

Illustration: Place holder with bookmark [ContactPostalAddress]

In order to insert bookmarks, select from menu:

Insert -- Bookmark

Illustration: Dialogbox bookmarks

Insert the name of the bookmark, here: ContactPostalAddress. Click on the button "Add" to store the bookmark to the list. The dialog box closes automatically.

The same procedure is to do in order to create a bookmark for the letter salutation. Insert a textual information e.g. letter salutation and highlight the complete text as showed within the illustration below.

Then insert the corresponding bookmark. To do so, select from menu:

Insert -- Bookmark

Insert once more the name of the bookmark, here: ContactLetterSalutation. Click on the button "Add" to store the bookmark to the list. The dialog box closes automatically.

Finally - when all bookmarks are defined and inserted to the template - update the letter template by using the icon within the menu:

File -- Update

Finally select from menu:

Close and return to template WinWord Document

Click on the button to save the letter template to your Notes document container.

The letter template is correctly stored and can be used as personal letter template in GeoCom® Customer & Contacts.

Note: A list of field names used within the letter template you'll find in Notes when choosing from the menu:

Actions -- Fieldnames for use in Microsoft Word

Illustration: Dialog box Fieldnames for use in Microsoft Word

3.5.3.4 Step 4: Creating letters using MS-Word templates

To create a letter based on an existing MS-Word letter template, first select the corresponding contact profile and select it, so it's highlighted

within the view. Then click on the button.

A dialog box opens, displaying the different forms for correspondence activities. Select form the list the option "WinWord Document" and checkmark "use template". Confirm your selection with OK.

Illustration: Dialog “Create outgoing correspondence”

Another dialog box opens displaying the complete list of letter templates based on MS-Word documents:

Illustration: Dialog box "Template selection"

Select from the list the corresponding letter template and confirm with OK. The selected letter template will automatically be opened within the word processing system MS-Word. The previously defined bookmarks are replaced by the corresponding entries of the contact profile.

Illustration: WinWord document with address and letter salutation

Now, you can print the letter. To update the letter template, click on the icon within the menu:

File -- Update

Finally, select from menu:

File -- Close and return to template WinWord Document

Click on the button to save the letter. The letter template is now saved to the history of the customer relationship.

3.5.4 Outgoing correspondence: Using MS-Word for printing address slips

Beside letter templates based on MS-Word you can also create address slips using the Microsoft word processing system without closing GeoCom® Customer & Contacts.

The procedure is similar to creating letter templates using MS-Word except for one difference: Usage of the template as address slips template has to be indicated within the Notes document.

3.5.4.1 Step 1: Preparation of the Notes document for address slips

Indication of usage as address slips is done by clicking the corresponding option within the Notes document.

Illustration: Template WinWord Document

Choose “Address slips” as template type.

3.5.4.2 Step 2: Preparation of the MS-Word document as template for address slips

Here you will find instructions on how to modify MS Word documents in order to use them as templates for address labels.

GeoCom® Customer & Contacts uses tables for positioning, so you should first delete all text parts of the document.

Then, insert a table. For this select from menu:

Table -- Insert Cells -- Table

Specify the number of columns that should be used. The number of rows is irrelevant, as GeoCom® Customer & Contacts automatically enhances the table as needed.

Next you have to specify the table and page properties according to your requirements.

Select your table and select from menu:

Table -- Table properties

In the "Table"-tab select "Options" and enter the cell borders to specify how the text is to be positioned within table fields.

The tab "Row" lets you specify the height of the table cells. You should enter the exact height according to your requirements. Switching pages within cells should be forbidden.

The tabs "Column" and "Row" should contain the desired width of your labels.

Then, click OK in order to adopt your changes.

Now, you have to set up the margins of the page according to your requirements. Select from menu:

File – Page Setup

Enter the values for the upper and left margins. Make sure the positioning is correct regarding your templates.

You can set the lower and right margin to 0 cm. These boundaries will automatically arise from the cell dimensions.

The values for gutter, header and footer should be set to 0 cm as well.

Confirm your changes by clicking OK. Your changes will be adopted to the document.

Note: Most printers have restrictions on printing borders, so make sure to use a table layout according to your printer requirements.

Into the first cell of your table you should enter a ‘dummy address text’ as bookmark.

Illustration: MS-Word document with table cell and dummy address (bookmark)

Then, add a bookmark, e.g. address. Highlight the text (only the selected parts of the text will be replaced by the original address data).

Select from menu:

Insert -- Bookmark

Illustration: Dialog Bookmark for address field

Enter the tag name to be able to adopt the postal address of the selected contacts. The bookmark is to be followed by the filling definition by which the address slips are to be created. Possible values for this are _InsertColumn (to place the entries column-wise), resp. _InsertRow (to fill in the data line-by-line).

Example:

To fill in the data of your contacts' postal addresses line-by-line, you should have to name the bookmark

ContactPostalAddress_InsertRow.

Select "Add" to store the bookmark to your dummy text.

Illustration: Table with bookmark for address data

Finally - when all bookmarks are defined and inserted to the template - update the template by using the icon within the menu:

File -- Update

Finally select from menu:

Close and return to template WinWord Document

Note: A list of field names used within the letter template you'll find in Notes.

Click therefore the menu within:

Actions -- Fieldnames for use in Microsoft Word

3.5.4.3 Step 3: Creating address slips

In order to create and print a list of address slips, first select within the navigator the view "1. Activity by a. company name...". Then select contact profiles for which you want to create address slips and click on the button .

The dialog box managing the outgoing correspondence opens. Select from the list "WinWord document" and checkmark "use template". Confirm with OK.

From the next dialog box select the template for the address slips, e.g. "Template address slips", and click OK to proceed.

You will be asked for the position from which to start printing. To start printing in the first table field, just click OK, otherwise enter the desired starting position and click OK.

MS Word will be started with your selected contacts' addresses filled into the table fields. If needed you can now adjust the inserted addresses. If the entries all are correct, you can print the document using. Therefore select from menu:

File – Print

3.5.5 Outgoing correspondence: e-mail

To send an e-mail to a customer from within GeoCom® Customer &

Contacts, first search for the corresponding customer profile and mark the appendant ontact profile (e.g. from view “1. Activity by..a. company name”). By selecting multiple contacts you can send the e-mail to all these contacts at the same time.

3.5.5.1 Create and send an e-mail

After you have selected the recipient(s) of your e-mail click on the

button.

The following dialog box opens:

Illustration: Dialog box "Create outgoing correspondence"

By default the checkbox “use template” is activated. In order not to use a template click into the checkbox. The selection will be removed.

Select the type of correspondence from the list (option "Notes e-mail") and confirm the selection with OK.

The following dialog box for the management of outgoing correspondence will be opened.

Illustration: "Outgoing e-mail".

For the administration of outgoing Notes e-mail you have the following options:

- recipient (the e-mail address)
- copy to (address of the recipients who will receive a copy of the e-mail). The main recipient is informed that copies are sent to further recipients
- blind copy to (address of recipients who will receive a "blind" copy of the e-mail). The main recipient is not informed that copies are sent to further recipients
- subject (short information about the content of the e-mail)
- date (the date the e-mail message was sent)

Into the last field you can enter text containing the main information of the e-mail message.

Note: If a contact profile counts with an e-mail address as well as with a fax number a dialog box appears indicating that multiple recipient addresses are detected. Select the corresponding address and confirm with OK.

Illustration: Dialog box "multiple recipient addresses detected"

When you finished to fill in the fields, save the document. The following dialog box opens:

Illustration: Dialog box "Close Window"

Selecting the option "Send and keep a copy" (pre-selected) the e-mail will be sent and a copy will be stored to the history of the customer-relationship.

In order to save first the document but not to send it yet, check-mark the option "save but don't send yet". The document (Notes e-mail) will be stored to the history of the customer-relationship but still remain unsent. The e-mail can be sent at every time.

However, in order to sent an e-mail, it is necessary to select the corresponding workspace. To do so select the mail function (within the status bar at the bottom of the window) by clicking on it. The view will be enlarged. Now select the correct workspace (e.g. Internet).

The document concerning outgoing e-mail messages is indicated by the symbol within the history.

3.5.5.2 Automatic adoption of information from mail database

Within the process of e-mail sending it is possible – similar to the automatic management of incoming correspondence – to automatically adopt information from the original e-mail.

Select the corresponding contact profile so that it is highlighted, e.g. select the view "1. Activity by ... a. company name". Click on the button

.

In order to adopt automatically information of an existing e-mail, first select the option “E-Mail“ and confirm with OK. The document for the management of incoming correspondence will be opened.

Now, to adopt the information from the original E-mail, first change into

field “content“. Then click on button
within the symbol bar.

A dialog box opens displaying e-mails.

Illustration: Dialog box “Import from mail database“

Select the corresponding mail with a mouseclick, so that it is highlighted and confirm your selection with OK. All original e-mail information, e.g. sender, content etc. will be transferred into the new outgoing e-mail document.

Finally, add this document to the history by clicking on the button

.

When you finished to fill in the fields, save the document. The following dialog box opens:

Illustration: Dialog box "Send-options"

Selecting the option "Send and keep a copy" (pre-selected) the e-mail will be sent and a copy will be stored to the history of the customer-relationship.

In order to save first the document but not to send it yet, check-mark the option "save but don't send yet". The document (Notes e-mail) will be stored to the history of the customer-relationship but still remain unsent. The e-mail can be sent at every time.

However, in order to sent an e-mail, it is necessary to select the corresponding workspace. To do so select the mail function (within the status bar at the bottom) of the window) by clicking on it. The view will be enlarged. Now select the correct workspace (Internet).

The document concerning outgoing e-mail messages is indicated by the symbol within the history.

3.5.5.3 Usage of e-mail templates

On creation of an e-mail, data can automatically be adopted from selected documents. In order to do so, you have to create and use a template with certain place holders. In the following, creation and usage of e-mail templates will be described.

3.5.5.3.1 Step 1: Creating an e-mail template

To do so, first open the view “7. Miscellaneous a. Templates“. If you

wish to create a new template, click on the button
and select from the dialog box “outgoing correspondence” the option “Notes E-mail”. Confirm with OK.

Illustration: Template type e-mail

You’ll get an empty Notes e-mail document:

Illustration: Notes E-Mail document

Enter a brief description for the Notes E-mail template and select from the Notes Public Address Book (PAB) which persons should use the template. Enter */ISG in order to make sure that all users of the domain ISG have access to this template. Finally, enter a category and a subject.

3.5.5.3.2 Step 2: Preparing the text body including bookmarks

The textual information of the E-mail can consist on up to five fields, whereas the fields 1;3;5 serve for textual and graphical information. The fields 2 and 4 serves for a dummy text as bookmark for e.g. letter salutation etc.

To get a selection list containing all bookmarks for mass mailings click on the button .

Field 1: serves as header, e.g. icon

Field 2: enter dummy text as bookmark, e.g. letter salutation

Field 3: serves as field for the main text (not parametric)

Field 4: enter dummy text as bookmark

Field 5: serves as footer, e.g. icon

Example:

Enter to the field 2 as showed below:

<Recipient:

<TAB><ContactLongName>, <ContactFax><CR>>

<Recipient Copy:

CC <TAB> <ContactLongName>, <ContactFax><CR>>

<Recipient Blind copy:

BCC <ContactLongName>, <ContactFax><CR>>

<ContactLetterSalutation>

enter your text, e.g. “we are pleased to inform you that the new upgrade of the application GeoCom Customer & Contacts is available.”

Best regards,

Greg Davis

Illustration: E-mail template with bookmarks

Now, check all entries, fill in the bookmarks and textual and/or graphical information and save the e-mail template.

New E-mails and mass mailings created with parametric E-mails automatically adopt all relevant data from the previously selected contact profiles, e.g. E-mail address, salutation incl. all recipients of copies (CC) and blind copies (BCC).

3.5.5.3.3 Step 3: Bookmarks for recipients lists in mass mailings

Besides single fields also field lists can be adopted into the body of a message (e.g. all recipients of a mass mailing).

For this you can use the following syntax:

<RECIPIENTS <TAB><ContactLongName>, <ContactPhone><CR>>

Within a field definition you can use the keywords RECIPIENTS (for all recipients), PRIMARY (for first recipient only) and CC (for all recipients of copies). <TAB> (insertion of a tabulator space) and <CR> (carriage return, new line) serve to format the text, whereas the structure of the list itself is being fixed by field definitions.

3.5.5.3.4 Step 4: Creating an e-mail from a template

To create an e-mail from an existing e-mail template, first select the corresponding customer or contact profile, so that it is highlighted within the current view.

Click the button .

Choose the option “Notes e-mail” and make sure the checkbox “Use template” is activated.

Illustration: Outgoing e-mail

The following dialog will be opened:

Illustration: Select e-mail template

Select the corresponding template and confirm with OK to open the e-mail form.

The following screenshot shows an empty e-mail form with adopted field values.

3.5.6 Mass mailings

Mass mailings are created by combinating contact profiles and letter templates. The procedure from selecting contacts to creating a mass mailing will be described in the this section.

Besides this procedure the option “Create mass mailing” can be used in the outgoing correspondence dialog.

3.5.6.1 Selecting contact profiles

First select the contact profiles (here: the names of the contact persons) by switching to the main menu (graphical navigator) and choosing the option “selected contacts” from the view “Contacts”.

Illustration: Menu Contacts

Now click the button . The following search form for contact profiles appears:

Illustration: Search form contact profiles

Now enter your search request into the fields and click

to find the corresponding contact profiles.

Example:

A search request of “4*” in the field “Zip Code” will yield all contact profiles which have a Zip Code starting with 4.

Note: The asterisk (*) is used as a wildcard. All entries are combined by a logical AND operator.

To force an OR operation, start multiple searches one after another. Search results will be added to the result folder.

3.5.6.2 Postprocessing of the recipients list

Now you can edit the selection of documents within the folder, e.g. by removing one or more entries from the folder. Select the entries you want to remove (click for each entry into the left scrollbar so the entry is ticked). Choose from menu:

Actions – Remove from folder

This action only removes the selected documents from the selection folder, it does not delete the documents from the database.

3.5.6.3 Selecting a template

After you have made your selection, click the button

to create the mails. You will see a dialog showing all available templates.

Illustration: Templates for mass mailings

Select a suitable template and confirm with OK.

3.5.6.4 Mass mailing from template

If you chose a template for your mass mailings, documents containing the template content (completed by contact specific data like address etc.) will automatically be generated. If you confirm generation of these documents, they will be stored in the folder “mass mailings” from where you can later print them.

3.5.6.4.1 Mass mailing from WinWord template

If you have selected a template with an embedded MS-Word document, you will receive the following dialog where you can decide what to do with the mass mailing:

Illustration: Dialog box options for MS-Word mass mailings

Another dialog will show the number of documents created. Confirm again to close the process.

3.5.6.4.2 Mass mailing from e-mail template

If you have selected an e-mail template the documents will be generated as e-mails resp. fax message.

The following dialog lets you decide, which recipients should be normal recipients and which should receive a copy (CC) or a blind copy (BCC).

Illustration: Dialog for managing Mass mailings

You can as well specify whether the documents are to be sent immediately or to be saved first.

If you want to send the documents immediately you have to choose whether you wish to send one e-mail resp. one fax to the recipients list or to send a single e-mail resp. fax to every recipient.

Whether a person receives the message as fax or e-mail depends on the settings in the corresponding contact profile. If only the e-mail address OR the fax number should be specified within the contact profile, only the present specification will be used.

Should both fields be filled in, you can choose the way this person should be contacted by selecting the way in the contact profile. The currently selected method is marked with an “(M)”.

Illustration: Contact profile, “(M)” marks e-mail recipient

While in edit mode a single click on one of the entries Fax or E-mail changes the status.

Whether a person receives a fax or an e-mail also depends on the configuration settings for the Fax Gateway.

In the global configuration you can specify the Mail-to-Fax-Gateway under the topic “E-Mail”.

3.5.6.5 Printing mass mailings

Clicking the button starts printing of your specified mass mailings. Before activating the print job you can check the data to be printed for possible errors.

Start printing by clicking the button . Alternatively you can

use the button to print the corresponding address documents.

Note: In order to empty the folder click the button .

3.6 Miscellaneous

With the document “Miscellaneous” you can manage diverse information that will not fit into any other scheme.

In order to create a document, first select the corresponding customer profile.

Now click on the button in order to change the Action-Bar (It is necessary to see the button for generating a document of the type “miscellaneous”).

Click on the button in the Action-Bar. A document to manage miscellaneous information will be opened.

Illustration: “Miscellaneous”.

The company name will be adopted into the document from the customer profile. Of course, you can change the date and company name manually.

To save the document it is necessary to fill in the field “Subject” .

Write your text into the field “Content”.

To save the document click on the button.

3.7 Creating offers

Within a relationship with a customer you might want to create offers for different products and services. In order to create an offer first select the corresponding customer profile.

Now click on the button in order to change the Action-Bar. (It is necessary to visualise the button for generating new offers.)

Click on the button in the Action-Bar. A document to create an offer opens.

Illustration: Document for creating offers

The customer profile you have selected is adopted automatically as the corresponding addressee. The pre-selected entry can be changed by selecting another customer profile (from the Lotus Notes address book)

Now enter a definition for the project. The person responsible to deal with the offer is also pre-selected. Another person can be adopted from the Lotus Notes address book.

Then fill in the following items:

- order date
- expiration date
- amount

To save the document click on the button.

3.8 Transactions

Within a relationship with a customer you might manage transactions concerning different products and services. In order to create a transaction document, first select the corresponding customer profile.

Now click on the button in order to change the Action-Bar. (It is necessary to see the button for generating transactions.)

Click on the button in the Action-Bar. A document to manage a transaction opens.

Illustration: “Transaction”.

The customer profile you have selected will be adopted automatically as the addressee of the transaction. The pre-selected entry can be changed by selecting a different customer profile from the Lotus Notes address book

Now enter a definition for the project. The person in charge of dealing with the offer is also pre-selected. Another person can be assigned from the Lotus Notes address book.

Fill in the following items now:

- invoice number
- invoice item
- product / service

To save the document click on the button.

4 Actions

During daily the work with the database several activities can be executed over the Menu bar. These specific actions are described in the following paragraphs.

4.1 Global settings for new users

In order to have the same personal settings for all new users as a starting point you can use a new action form the menu:

Illustration: Actions – Settings for new users

Add your common settings for new users into the following form.

Illustration: default settings for new users

These settings are used as a default for new users. New users are those who have never used the application before. You can not modify profiles of existing (already known) users with this action.

To allow already existing users the usage of global settings please advice them to use the action "Use settings for new users" from the personal configuration form.

Illustration: Adopt default settings for new users as an existing user.

4.2 Creating alarm entries

You can create an alarm in your personal calendar for yourself or another person who has admitted you to manage her or his calendar entries. To do so, select from Menu bar:

Actions – Create alarm

The following dialog box comes up:

Illustration: Dialog box "Create Alarm"

Fill in date using the Notes calendar , then, fix the time and select the recipient of the new alarm. Insert an alarm text and confirm with OK.

Note: In order to modify the calendar of another person you must have the corresponding rights.

4.3 Modifying keywords

Selected keywords contained the documents can be changed without the need to open the documents.

To modify keywords in documents, first check-mark one or more documents.

Then, select from menu:

Actions -- Selected documents -- modify keywords.

The following dialog box comes up:

Illustration: "Modify keywords"

From the list at the top, select a keyword you wish to modify in all selected documents (e.g. region); now select a new value for the selected keyword from the list window at the bottom and confirm with OK.

Another dialog box appears.

Illustration: Dialog box "Modify keywords"

Confirm with Yes (Ja) to change the keyword in all selected documents. In order to Cancel click on the button No (Nein).

4.4 Search and replace fields

This action allows you to change a field values within several documents simultaneously. Administration rights are required to use this function.

The action is especially useful to change single entries within multiple value fields.

In order to change a certain value, first select one or more documents.

Then select from menu:

Actions -- Selected documents -- Search and replace fields.

The following dialog appears:

Illustration: Global search and replace

In this example the field AccountManager is searched in all selected documents. If the value "*Jones*" is found in one of the documents, this value will be replaced by "John Donalds/ISG" after confirmation.

4.5 Assigning a contact profile to another customer profile

If the relationship between a contact person and a company has changed or you have inadvertently assigned a contact or an activity to a wrong customer profile, you can re-assign several contact profiles or activities to another customer profile at the same time.

In order to re-assign a contact profile or an activity to another customer profile go through the following steps:

In any view, check-mark the respective contacts or activities.

Now, select from Menu bar:

Actions -- Selected documents -- Re-assign customer

Select a new customer profile from the customer list and confirm your selection with OK.

You can also use this action to convert private customer profiles to contact profiles and re-assign these records to another company in a single step. Do NOT select the related activities or contacts assigned to this contact or private customer, these entries are moved automatically.

4.6 Convert contact profile to private customer profile

If a contact is no longer assigned to a company you can extract and convert the contact profile to a private customer profile (in other words convert it from a response document type to a main document on the company level).

In any activity view, select the respective private customer profiles (do NOT select the related activities or contacts assign to this entry, these entries are moved automatically).

Now select from Menu bar:

Actions -- Selected documents -- Convert contact to private customer

The number of selected entries is counted and you will be asked to confirm the action.

Please note that letter salutation and postal address have to be updated manually or by the appropriate view action.

While converting a contact profile to a private customer profile only specific information concerning the individual person will be transferred to the new document. Other information such as company name as well as further information regarding to the company will not be adopted to the private customer profile.

Then, select the "new" private customer profile and double click on it in order to fill in the new private address.

4.7 Updating view title

Within a view every document is represented by a single view title.

The view titles of all or selected documents within the database can be updated.

To change a view title, select the corresponding entries.

Then select from Menu bar:

Edit -- select all

or put a check-mark next to individual entries), then, in the Menu bar click

Actions -- Selected documents -- update view title

The selected view titles are immediately updated.

4.8 Changing date of last mailing in several contact profiles

Change into the Main Menu (Graphical Navigator).

Select the folder "selected contacts". Then select the corresponding documents.

Finally, choose from the Menu bar:

Actions -- Selected documents -- Update last mailing date

Insert new date and confirm with **OK**.

4.9 Updating postal address

The postal addresses can be updated for all or only for selected customer profiles.

In order to update a postal address, select from the menu:

Edit -- Select All (in order to update the addresses in for all documents).

or

hit the corresponding documents.

Select from the menu:

Actions -- Selected Documents -- Update postal address

The update process will be started immediately and update the selected documents if necessary.

4.10 Updating letter salutation

The letter salutation can be re calculated in one or more selected contact profiles. In order to update the letter salutation select from the menu:

Edit -- Select All (in order to update the letter salutation for all documents)

or

hit the corresponding documents.

Select from the menu:

Actions - Update letter salutation

The update process will be started immediately and update the selected documents if necessary.

4.11 Update of phone and fax numbers

Beside to update postal addresses and letter salutations its also possible to update phone and fax numbers.

Updates become necessarily if phone and fax numbers of a client have changed or a new base number has been installed, however the dialling code stay remained.

To avoid modifying every single contact profile manually its possible to modify all corresponding contact profiles in one single step.

To change phone and fax numbers, first select the corresponding customer profile and checkmark the contact profiles for that you want to change the numbers.

Select from menu:

Activities -- Selected documents -- Update phone and fax numbers

The following dialog box appears:

Illustration: Dialog box Modify phone and fax numbers

The upper window of the dialogue box provides you with an overview of all phone and fax numbers corresponding to the documents you have selected. Now you can change numbers completely or partly.

To change e.g. the base number of a customer profile with its corresponding contact profiles do the following steps:

Input to the field "search for" the old value e.g. 0234 - **94175** (alternatively input the dialling code plus "*", e.g. "0234 - *"). Input to the field "and replace by" the new number part, that should replace the previous number, e.g. 0234 - **700**. Use the button "test" to view your modifications in the above list of phone and fax numbers. To modify the selected documents after testing leave the dialog box with OK or abort with cancel.

Numbers of mobile phones or other numbers, that show different dialling codes, will not be affected by changes.

4.12 Setting of status fields in selected customer- and contact profiles

Similar to the updating process of postal addresses, letter salutations and phone and fax numbers, its possible to modify status fields in selected customer- and contact profiles.

Note: According to the profile (customer or contact) that was selected at first different fields are shown within the dialog mask.

4.12.1 Modifying status fields within customer profiles

All over five status fields can be modified simultaneously in one or more customer profiles. The modifications can be done for the following fields:

- Responsible
- Contact by
- Customer type
- Region
- Customer status

To change the status fields in one or more customer profiles, first change within the navigator to the view "1. Activity by...a. company name".

Checkmark within the view the corresponding single customer profile or the customer profiles you want to change, so that they are highlighted.

Then select from the menu:

Actions -- Selected documents -- Modify customer or contact profiles

Illustration: Modify customer or contact profiles

You'll get the following dialog box:

Illustration: Dialog box - update selected customer profiles

Note: If only one single customer profile is selected, the document's inherent status fields appear checkmarked within the dialog box. However, if several customer profiles are selected, the dialog box don't pre-selected values.

Illustration: Dialog box - update selected customer profiles

Note: If only one single customer profile is selected, the document's inherent status fields appear checkmarked within the dialog box. However, if several customer profiles are selected, the dialog box don't pre-selected values.

- **Responsible**: The responsible person can be adopted from the Notes address book. Confirm the selection by clicking the checkbox "modify value?"

- **Contact by**: Here you can define the way a contact has come about, e.g. by Internet, personal contact. Confirm the modification by clicking the checkbox "modify value?"
- **Customer type**: Here you can select the customer's type, e.g. (Industry, Insurance etc.). Confirm the modification by clicking the checkbox "modify value?"
- **Region**: Here you can select region were the customer comes from. Confirm the modification by clicking the checkbox "modify value?"
- **Customer status**: Select by clicking on one or more options the customer's status, e.g. if the customer should get the status active, inactive, interested etc. Confirm the modification by clicking the checkbox "modify value?".

Note: As default the checkbox "Modify contact profiles also (without confirmation") is selected. This makes possible, that the modifications for all status fields become valid, as soon as you finally confirm with OK.

4.12.2 Modifying status fields within contact profiles

Similar to the modification process of status fields in one or several customer profiles, its possible to modify one or more contact profiles simultaneously.

All over five status fields can be modified simultaneously in one or several contact profiles. The modifications can be done for the following fields:

- Responsible
- Contact status
- Customer type
- Region
- Customer status
- Last mailing

To change the status fields in one or several contact profiles, first change within the navigator to the view "1. Activity by...a. company name".

Checkmark within the view the corresponding single contact profile and the contact profiles you want to change, so that they are highlighted.

Then select from the menu:

Actions -- Selected documents -- Modify customer or contact profiles

You'll get the following dialog box:

Illustration: Dialog box - update selected contact profiles

Note: If only one single contact profile is selected, the document's inherent status fields appear checkmarked within the dialog box. However, if several contact profiles are selected, the dialog box don't show status fields.

- **Responsible**: The responsible person can be adopted from the Notes address book. Confirm the modification by clicking the checkbox "modify value?"
- **Contact status**: Here you can select the contact status, e.g. personal contact. Confirm the modification by clicking the checkbox "modify value?"
- **Customer type**: Select by clicking on one or more options the customer type, e.g. if the customer depends to industry or telecommunication services. Confirm the modification by clicking the checkbox "modify value?".
- **Region**: Here you can select region were the customer comes from. Confirm the modification by clicking the checkbox "modify value?"
- **Customer status**: Select by clicking on one or more options the customer's status, e.g. if the customer should get the status active, inactive, interested. Confirm the modification by clicking the checkbox "modify value?".
- **Last Mailing**: Via Notes Calendar its possible to adopt the date from last mailing. Confirm the modification by clicking the checkbox "modify value?".

Note: To change the fields within the documents corresponding to the modifications you have set, click on the button OK. The modifications for all status fields become valid.

4.13 Automatically add reader and author fields (hiddenreader-fields)

This option was in previous versions available via the special language dependent entries "HIDDENREADERFIELDS" and

"HIDDENAUTHORFIELDS" and could be configured now more comfortable via the main configuration interface.

The feature is useful to add automatically predefined reader and author fields to new documents. You can do this within the main configuration document in the section "Common settings".

This is especially important for replicas in order to allow servers to "see" documents and therefore to enable the replication process.

To add these fields to already existing documents you can use the action "Update view titles". But note that you can only update documents you have reader and author access to. This might result in asking other employees with special rights to run this action.

Note: If you have already used this option all existing settings will be properly defaulted into the right fields on the first usage of the configuration document. After checking the new settings you can remove the "HIDDENREADERFIELDS" and "HIDDENAUTHORFIELDS" from the special settings. That means also that you must save the configuration before allowing normal users to access the updated database.

4.13.1 Reader fields

This field type enables the visibility of documents to individuals, groups or roles.

Insert a fieldname of your choice, e.g. DocReader, add group names and/or roles and select document type to automatically add these fields.

Note: If you add a new role you also have to add this role manually to the access control list in order to assign this role to groups or individuals.

4.13.2 Author fields

This field type allows users with Author access to the database to modify documents. Users with access as Editor, Designer or Manager have always the right to modify documents of "other" people.

5 Re-submission

For optimal task tracking you can assign a re-submission date to any document (this way you will not forget to carry out pending jobs like calling a customer).

At the same time, you also can delegate tasks to other employees.

5.1 Assigning re-submission date to documents

Each document can be assigned a date for re-submission. Open the corresponding document, e.g. a document for the administration of calls, a "meeting document", letters etc.

Next, click on the tickler button in the Action-Bar. The following dialog box opens:

Illustration: Dialog box "Re-submission"

The status "open" is reselected. If necessary you can use the pull down menu to select another status such as "in process", "postponed" or "done".

Click the button to open the calendar and select a suitable date for re-submission. If not explicitly selected, the date for the task is set to the following day.

Just as the status, you can assign a priority to the activity from a range of "high" and "normal". By default the priority "high" is set.

Select from the Lotus Notes address book the person who is responsible for the activity.

Check one of the check boxes to set an activity, e.g. phone call, letter etc.

In order to set the time for an alarm click on the icon.

Scroll up or down within the window to select the exact time. Confirm your selection by clicking on the green symbol .

To forward the document with the re-submission date to the folder "Re-submission" finally confirm with OK.

5.2 Removing re-submission date from documents

To remove the re-submission date for one or several documents you have two options.

- within the view "1. Activity by ... a. company name“
- within the view "Re-submission“

To remove the re-submission date of a document within the view "A. activity by company name“, select the corresponding document with a mouse click. The document will appear in a frame like this:

Now, select from menu bar:

Actions -- Selected documents -- Remove re-submission

The icon (blue in the above example) next to the document type will disappear.

In order to remove a document marked with a re-submission date from the folder "Re-submission“, open the view "2. Re-submission by due date“ within the Standard Navigator.

You will get a detailed listing of all documents by due date. Check-mark one or more entries whose re-submission date you wish to cancel

and click on the button in the Action-Bar.

The document is removed from this folder.

5.3 Re-submission by due date

To get a detailed listing of those documents marked with a re-submission date call view “2. Re-submission by due date“.

Illustration: View: "2. Re-submission by due date"

5.4 Re-submission by task

In order to get an overview of documents re-submitted by task select the view "2. Re-submission by task“.

Double click to open the entry.

Illustration: View "2. Re-submission by task"

5.5 Re-submission calendar

Documents which have been assigned a re-submission date can be made visible within a personal calendar style view.

Select the view “2. Re-submission by calendar”.

Double click the entry to open and read or edit it.

Illustration: View: 2. Re-submission calendar

6 Personal configuration

The application's interface can be configured specifically to your individual needs. A personal configuration document is used to store your personal settings.

You can control start options, re-submission as well as the status of a customer or contact.

To set the personal configuration, select from the Menu bar:

Actions -- Admin -- Personal configuration

The following Dialog box opens. (open each option by clicking on the green icon).

Illustration: Dialog box “Personal configuration”

6.1 General options

The start option controls whether the Graphical Navigator is displayed each time the application is started or the view used when the application was closed the last time like activities, contacts or re-submission.

Click on the corresponding option.

Illustration: “General options”

6.2 Letter A 4

You can store your personal sender identification in the option display letter A4. This information is displayed in A4 letters above the postal address.

To position the place (city), e.g. **Munich,** in front of the date enter into the field the name of the city separated by a comma from the date, e.g. Munich, the 06th 09th 2000.

In the field "format date" you set the current date for each letter. You can select between by day, month, and year or - as usual in English speaking countries by year, month, and day.

Enter the following specifies into the field as shown:

dd/mm/yyyy specifies day/month/year (e.g. 06/09/2000)

yyyy/mm/dd specifies year/month/day (e.g. 2000/09/06)

Illustration: Letter A 4

6.3 Configuration of outgoing Notes-mails

The fields “Reply to” and “Message from” in outgoing Notes-mails can be configured according to personal needs. This is especially useful if a common sender address should appear in outgoing E-mails, e.g. helpdesk@geocom.de.

These configurations can be set globally for all users or individually to a single person via the personal configuration document. Though the role [SetSMTPSender] is required.

To check which roles are distributed to the users or to add new roles to a single person, click while pressing the right mouse button on the GeoCom® Customer & Contacts-icon.

Select from the menu the option access control list and click to the corresponding person, so that it is highlighted. Then select the role [SetSMTPSender] within the right window and checkmark it. Finally click on the button OK in order to save the modifications.

Illustration: Access control list

Note: Personal configuration values are used prior to global configuration values.

6.3.1 Configuration field "Reply to"

It is possible to configure the field “Reply to” for outgoing Notes-Mails globally.

To set the configuration for the field “Reply to” - globally for all users - change within the navigator to the view "1. Activity by...a. company name".

Then select from the menu:

Actions -- Admin – Configuration

Illustration: E-mail ("Reply to" and "Message from”)

Select from the menu the option "E-mail". Then click on the green twisty in order to open the configuration field.

Click into the field "Reply to" and enter the address to which E-mails should be sent. Usually it is a global E-mail address, e.g.

info@geocom.de

To save modifications to the global configuration document, click on

the button .

6.3.2 Configuration field "Message from"

Similar to the configuration of the field “Reply to” it is possible to configure globally the sender’s address in outgoing E-mails.

To do so, click into the field “Message from” and enter sender’s address. It is possible to enter more than one sender address.

Example:

*.de | "$CN" <benutzerverwaltung@geocom.de@NotesDomain>

*.uk | "$CN" <helpdesk@geocom.de@ NotesDomain >

* | "$CN" <helpdesk@geocom.de@ NotesDomain >

Note 1: In order to allow the SMTP task to process the sender request you **MUST** add the local Notes-Domain to the address: so if your domain name in the internet is geocom add “**@geocom**” to the address. This part will be removed by the SMTP task while sending the mail.

The above example makes messages to German addresses look like “John Smith" <benutzerverwaltung@geocom.de>; recipients in English speaking countries will see the sender as “John Smith" <helpdesk@geocom.de>.

Note 2: "$CN" is the abbreviation for "Common Name". It means that additionally to the sender’s address the name of the person who sent an E-mail will be included.

To save modifications to the global configuration document, click on

the button .

6.4 MS-Word version

Use the option "Microsoft Word Document“ to propagate the version of Microsoft Word installed on your computer.

Use the pull-down menu in order to select the version of Microsoft Word installed on your computer and click OK to confirm your choice.

Fill into the field "Format Date" the way how the date should be showed in future MS-Word-documents, e.g. Day/Month/Year = dd/mm/yyyy.

Additionally you'll find a personal configuration section for MS-Word. This new multi value entry is indicated by the option "SPECIAL 1 ... 10". This field serves for any personal settings, that should appear only in your personal MS-Word template. E.g. you can enter your name, phone number, e-mail address or any other entry that should appear in the MS-Word-template. Do one entry per line. The personal settings are user-dependent and cannot be used by other persons.

Illustration Microsoft Word Document

6.5 Customer profile

Beside to fix the common settings according to country codes within the personal configuration document, its also possible to fix settings according to letter salutation and postal address for customer profiles. These settings are valid for postal letters and E-mails.

The option to define individually via default button the letter salutation as well as the postal address according to customer profiles makes it possible to sent out letters and mass mailings via the customer profile.

Illustration: "Customer profiles"

6.5.1 Settings for letter salutations

The salutation of letters that are addressed to no special recipient can be configured within the field “Special format letter salutation”. This configuration can be done according to individual needs.

As default you’ll get the following salutation formats. To open it, click on the default-button.Beside this it is also possible to add special letter salutation formats. Enter a new format in this way:

<COUNTRY>=Germany | Sehr geehrte Damen und Herren,

<COUNTRY>=Great Britain | Ladies and Gentlemen,

That means, if in a customer profile the “country code” *Germany* is indicated the generation of the letter salutation will be executed in German.

Example:

If no specific letter salutation is available the letter salutation should be “*Ladies and Gentlemen*”.

Set an entry as follows:

* | Ladies and Gentlemen

6.5.2 Settings for postal addresses

Similar to the setting for the letter salutation the postal address can be defined.

As default you’ll get the following postal addresses. To open it, click on the default-button.

Beside this it is also possible to add specific postal addresses.

Example:

An address format should contain the items: company, branch, address, postal code, city and country:

Enter a new format in this way.

COMPANY><CR><BRANCH><CR><ADDRESS><CR>
<CR>

<ZIP><CR><CITY><CR><COUNTRY>

Note: The special key word <CR> can be used to insert a conditional carriage return (means that the new line is only inserted if the line is not empty), the special key word <BR> includes an unconditional new line.

6.6 Personal configuration contact profile

Similar to the settings according to customer profiles, it is possible to fix letter salutation and postal address for contact profiles. These settings are also valid for postal letters and E-mails.

Illustration: Personal configuration – Settings Contact profile

Default salutation

Here you can fix which salutation should appear every time you open a new contact profile, e.g. "Mr." or "Mrs." etc.

Assign activity to contact if possible

Checkmark this option in order to assign any activity (correspondence, phone calls) to a single person - if the contact person was selected before (if not checked it will be assigned to the customer). All activities are listed below the contact profile.

Default country

This entry will be used to translate the country in the postal address. If the default country "Germany" should be replaced by "Deutschland" the setting has to be as follows:

"Germany|Deutschland"

If the setting "Germany" should not appear because you are located in Germany , fill in

"Germany|"

6.6.1 Settings for letter salutation

Identical for letter salutation translation. The setting for a letter salutation can be as follows:

Mr.| Dear Mr.
Mrs.|Dear Mrs.

It is also possible to configure the letter salutation for single recipients. The configuration can be set within the field “Special format letter salutation”. The settings can be done according to individual needs.

As default you’ll get alternatively the following salutation formats. To open it, click on the default-button.

Beside this it is also possible to add special letter salutation formats. Enter a new format in this way.

<SALUTATION>=Mr. | Dear Mr. <TITLE> <SURNAME>

<SALUTATION>=Mrs. | Dear Mrs. <TITLE> <SURNAME>

That means, if in a contact profile the “salutation” Mr. is indicated the letter salutation will show Dear Mr. plus title and Surname.

If no specific letter salutation is available the letter salutation should be “Ladies and Gentlemen”.

Set an entry as follows:

* | Ladies and Gentlemen

6.6.2 Settings postal address

Similar to the setting letter salutation, it is possible to define the postal address for a contact profile.

Postal address

Here you can fix the settings for the automatically generation of postal addresses. Into the field "postal address" the customer's name (name of the enterprise etc.) will be placed.

Postal address translation

In addition the field "postal address translation" can be configured.

Place each translations for the field "salutation" in a new line. The text on the left side of | (vertical bar) is searched and replaced by the text on the right side. The setting for a salutation can be as follows:

Mr.|Mr.
Mrs.|Mrs.

As default you’ll get alternatively the following postal address. To open it, click on the default-button.

Beside this it is also possible to add specific postal addresses.

Example:

An address format should contain the items: company, branch, address, postal code, city and country:

Enter a new format in this way.

<SALUTATION>=Mr. |

COMPANY><CR><BRANCH><CR><DIVISION>><CR><TITLE><GIVENNAME><INITIAL><SURNAME><ADDRESS><CR>
<CR><ZIP><CR><CITY><CR><COUNTRY>

6.7 Templates

The field "template used by“ is designed to enter further persons, that should have access to the template.

You can easily adopt those persons from the public Lotus Notes Address Book (PAB) whereas a “ * ” is used as wildcard. It can replace a domain name or a user name (Example: */ISG allows all users to have access to the template) Wildcards within names as “heh*” are not possible.

According to the default settings within the personal configuration document the selection list is reduced to those document types that were selected previously, here letter templates based on MS-Word.

Illustration: Dialog box "select a template"

According to the settings done within the personal configuration document (section Templates) the variety of templates will be reduced to the selected document type. If the checkbox “Show all templates in selection dialog“ is **not** checkmarked, only specific templates – corresponding to the selected document type – will be shown.

It means, if the option “letter A 4” and the checkbox use “template” is selected, only letter templates in format DIN –4 will be listed. Template for E-Mails or other templates will not be showed.

Note: This feature is restricted to Lotus-Notes Client V5.

6.8 Private customer

Similar to the settings according to customer and contacts profiles, it is also possible to fix letter salutation and postal address for private customers. These settings are valid for postal letters and E-mails.

Settings – postal address and letter salutation - can be fixed analogous to configuration for contact profiles.

First, you can fix which salutation should appear every time you open a new private customer profile, e.g. "Mr." or "Mrs." etc.

Section "Postal address translation". Here you don't fix the company's name, because this document should only be used recording private persons without company references.

Place each translations for the field "salutation" in a new line. The text on the left side of | (vertical bar) is searched and replaced by the text on the right side. The setting for a salutation can be as follows:

"Mr.|Mr."
"Mrs.|Mrs."

The section "letter salutation translation" will be configured as it described above. The setting for letter salutation can be as follows:

Mr.|Dear Mr.
Mrs.|Dear Mrs.

The **translation for default the country** is set as it is described above. See also chapter "8.5 Contact profile"

"Default country". Fill in the country, that should appear as default country within the private customer-document.

Illustration: “Private customer”

6.9 Phone support

Use the option "Phone support (TAPI)" to configure your personal TAPI settings.

In the check box, turn TAPI support on or off according to your needs. If you turn off TAPI support you need not fill in the other fields in this dialogue.

For "Dial out number“ specify any dialling prefix required for calls outside your company or telephone system; a typical example is "0".

Set the number of digits used as a dialling prefix, e.g. two digits for internal calls.

Apart from this you can define whether the phone dialog box should pop up each time you generate a call document.

Into the “Personal phone number list” enter other personal telephone numbers, one per line as shown below.

Illustration: "Phone support"

6.10 Automatic Re-submission

Beside the possibility to assign a re-submission date to each document for optimal task tracking you can also configure parameters for an automatic re-submission.

Automatic re-submission can be configured for two document types:

- Call document
- Letter A 4 document

For each of the two different document types you are free to set the pre-selection for the

- offset in days, e.g. 5; this is the time offset after which the document is brought to your attention again
- responsible person
- action, e.g. phone call, type correspondence (letter/fax/e-mail)

Illustration: Automatic Re-submission

To save your personal configuration settings click on the
button.

Note: To edit the personal configuration, select form Menu bar:

Actions -- Admin -- Personal configuration

The dialog box with the personal configuration settings opens. You can open each section with a mouseclick on the twistie next to it

7 Appendix A: Icons used within views

Within the different views specific icons are used to depict different functions. Thus, these icons serve as an optical reference.

Find below a list of the icons and the functions or items they are used for:

icon	**function**
	Twisty for opening views
	Customer profile documents
	Project profile documents
	Contact profile documents
	Incoming and outgoing call documents
	Miscellaneous
	Meeting documents
	Outgoing correspondence, DIN A-4
	Outgoing correspondence, E-mail
	Outgoing correspondence WinWord-Document
	Outgoing correspondence
	Incoming mail, letter and fax documents
	Checkmarked for deleting
	"Homepage" (inside of the customer profile document)
(red symbol)	re-submission date was set; " re-submission over due"
(blue symbol)	re-submission date was set; "re-submission for future date"
(green symbol)	re-submission date was set; " re-submission on current day"

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